

## Meeting Information

**Meeting Name:** Asset Management 1  
**Scribe:** DeVal Lott  
**Facilitator:** Ashley Peters  
**Date:** March 1, 2005  
**Time:** 1:00pm – 4:00pm  
**Location:** Suite 1616 West Tower

## Invitees/Attendees

+ In attendance, - Absent, # Substitute, \*Other

	Name	Organization/Department	Substituting For
+	Carol Colamarino	Agriculture	
+	Paul Cox	DOT	
+	Mark Brown	DOE	
+	Randy Trowell	DOE	
+	Travis Kennedy	Corrections	
+	Alan Cardin	DHR	
+	Chris Thomas	Forestry	
+	Sonia Scott	Forestry	
-	Gary McElroy	Pardon & Parole	
+	Jennifer Sanders	Pardon & Parole	
+	Constance McCrary	Pardon & Parole	
+	Lee Whitesides	Audits	
-	Asa Barnard	GTA	
+	Mary Trimble	GTA	
+	Meda Gibson	DTAE	
+	Victor Moore	GTA	

	<b>Name</b>	<b>Organization/Department</b>	<b>Substituting For</b>
+	Debbie Smith	Superior Courts	
*	Natalie Redding	Corrections	
+	Jackie Cardin	GTA	Asa Barnard
	<b>Project Staff</b>		<b>Role</b>
	Ashley Peters	Accenture	Facilitator
	Derek Barber	SAO	AM Lead
	Rusk Roam	SAO	AM Functional Staff

## Agenda

<b>Item No.</b>	<b>Topic</b>	<b>Presenter</b>
1.	Introduction	Ashley Peters
2.	Project Guiding Principles	Ashley Peters
3.	Meeting Handouts	Ashley Peters
4.	Topics for Discussion	Ashley Peters/Derek Barber
5.	Conclusion	Ashley Peters

## Meeting Summary

<b>Agenda Item No.</b>	<b>Main Points, Conclusions/Discussions, Decisions, Next Steps, Issues, New Action Items</b>
1,2,3	Introductions were made and attendees viewed the Fit Gap Guiding Principles slideshow and the meeting handouts were distributed and discussed.
4	Topics for Discussion

Agenda Item No.	Main Points, Conclusions/Discussions, Decisions, Next Steps, Issues, New Action Items
4A	<p><b>Express Add</b></p> <p>Modifications to version 7.02 were discussed and it was determined that most of the modification made previously to version 7.02 are now delivered in version 8.8 or can be controlled with the proper end user training. The few exceptions include the following:</p> <ul style="list-style-type: none"> <li>• <b>Prompt edit on Profile</b> – This modification makes the profile field a prompt edit field in the interface. We have certain profiles for &lt;5K and certain profiles for &gt;5K. <b>Group Consensus</b> in the session concluded that this modification needs to move forward to version 8.8. Version 8.8 “Low Value Trigger” may satisfy this need. The Low Value Trigger may have thresholds set and use either hard/soft warning/error message. <b>(See Action Item # 1)</b></li> <li>• <b>Rental translate value acquisition code</b> – This modification was made to add a translate value (RENTAL) to the acquisition code dropdown on the Asset Express Add and Asset Basic Information Panel. It was determined during the session that this would be a configuration issue during upgrade.</li> <li>• <b>PO ID field on the Express Add panel</b> – This modification was made to add a PO ID field on the Asset Express Add panel 1. Also, the PO ID should be populated from the PO module as part of the interface. <b>Group consensus</b> during the session was that this data is also held in the acquisition detail records within Asset Basic Information.</li> <li>• <b>Allow previous service date in Express Add panel</b> – This modification was made to add a panel to the Express Add panel group which will allow the users to enter a previous “In Service” date when entering assets. It was determined during the session that this functionality is delivered in version 8.8.</li> <li>• <b>Express Add Comments/Custodian</b> – This modification allowed the addition of a panel to the Express Add panel group in which to capture any comments on the asset and to list the custodian of the asset. It was recommended during the session that the interface be used for this purpose. This information may also be captured in the Basic Information page and <b>does not</b> require end users to have to perform additional asset searches/lookups. Meaning, at the time of asset creation the Asset Express Add pages are tightly integrated and linked to the Basic Information pages and allow a seamless, streamlined interface.</li> </ul>
4B	<p><b>Leased Assets</b></p> <p>It was determined during the session that this functionality is not used often in version 7.02. Problems have occurred with multiple year funding not calculating correctly.</p>

Agenda Item No.	Main Points, Conclusions/Discussions, Decisions, Next Steps, Issues, New Action Items
4C	<p><b>Basic Information</b></p> <p>Modifications to version 7.02 were discussed and it was determined that most of the modification made previously to version 7.02 are now delivered in version 8.8 or can be controlled with the proper end user training. The few exceptions include the following:</p> <ul style="list-style-type: none"> <li>• <b>Asset Status</b> – This modification added two translate values to the asset status field. The statuses added were “Missing” and “Stolen”. <b>Group Consensus</b> was to have this modification move forward in version 8.8 and handle the translate values as configuration work objects.</li> <li>• <b>Label change from PROD_Version to License Tag</b> – This modification was made to change the label of one field from prod_version to License Tag. This was made to accommodate license tags for agencies that have vehicles. It was determined during the session that this is a ‘cosmetic’ change to the system but that some agencies may still need this functionality. <b>(See Action Item # 2)</b></li> <li>• <b>Label change on plant data field</b> – This modification was made to modify the name of the “plant” data field on the Basic Information, Manufacturer panel to “federal percent”. It would modify the conversion programs to populate that field with the “FD%” prop field value. Audit Department personnel made a comment that we need to capture the “FD%” somewhere in the system. It was discussed that we may use Global configuration for split funds.</li> <li>• <b>Gray out default profile button</b> - This modification was made to prevent errors associated with data entry of cost information to the State Book versus a secondary book. It was determined during the session that this action could be prevented with the proper end user training.</li> <li>• <b>Unhide the Asset Details panel</b> – This modification was made to unhide the asset details panel which shows the asset routing indicator on the voucher inquiry panel group. It was recommended during the session that a report will show purchase orders with equipment type account codes but no profile ID's. Some users want more warning messages during data entry. <b>(See Action Item # 3)</b></li> </ul>
4D	<p><b>Copy Asset</b></p> <p>This discussion mainly focused on the copying of the “Tag #” from one asset to another. Research will be done to ensure that the Tag # will copy. <b>(See Action Item # 4)</b></p>

Agenda Item No.	Main Points, Conclusions/Discussions, Decisions, Next Steps, Issues, New Action Items
4E	<p><b>Cost Adjustments</b></p> <p>Modifications to version 7.02 were discussed and it was determined that most of the modification made previously to version 7.02 are now delivered in version 8.8 or can be controlled with the proper end user training.</p>
4F	<p><b>Asset Transfer</b></p> <p>Modifications to version 7.02 were discussed and it was determined that most of the modification made previously to version 7.02 are now delivered in version 8.8 or can be controlled with the proper end user training.</p>
4G	<p><b>Asset Retirement/Reinstatement</b></p> <p>This discussion focused on the Transaction # for Retired Assets (reference code). It was determined that this is a State requirement and further research will be done. <b>(See Action Item # 5)</b></p>
5	<p><b>Conclusions</b></p> <p>It was determined during the session that most of the modifications made to version 7.02 were being delivered in version 8.8 or that end user training could prevent user errors made during data entry.</p> <p>There was a general discussion concerning "Queries". The Subject Matter Experts want to ensure that they have adequate query access in the upgraded version. <b>(See Action Item # 6)</b></p>

**Action Item Review**

Action Item (AI) No.	Date Open	Description	Action/Response
AI1.	3/1/05	Low Value Trigger Validation	<p>Research to be done to see if this will prevent the Prompt Edit modification from being moved forward. Ashley and Derek will research further.</p> <p><b>Follow up Response:</b> PeopleSoft 8.8 functionality for Low Value Triggers and Capitalization Limits have been successfully tested and preliminary indications are that PS 8.8 provides similar business capability related to AM process. At present time, no system or process GAPS noted.</p>
AI2.	3/1/05	License Tags	<p>Follow up with the Department of Revenue. Derek Barber will contact the department.</p> <p><b>Derek to Follow-Up.</b></p>

Action Item (AI) No.	Date Open	Description	Action/Response
AI3.	3/1/05	Warning Messages with Profile ID (AP/PO) Query Tool	<p>Do we need more messages? DTAE says a hard error would not work for them because of their Bond money payments to the technical schools. Follow up research will be done by Ashley Peters.</p> <p><b>Follow Up Response:</b> Has been raised as an area of concern to Project Mgmt (Bart Haberbosch). This issue will continue to be monitored, but ultimately should be driven by accounting policy. The initial reaction from project leadership is to manage the <u>accuracy and completeness</u> of data flowing to Asset Management from feeder modules by leveraging the Query tool to perform daily reviews of transaction detail before transactions are posted during the nightly batch. The more proactively and regularly that various QA checks can be performed on source data is the optimal way to ensure data quality w/o incorporating excessive edits and validations into the application.</p>
AI4.	3/1/05	Tag Number – Copy Asset, does the system copy tag #?	<p>System testing to be done to see if the tag number will copy from one asset to another. Ashley Peters will perform testing.</p> <p><b>Follow Up Response:</b> Additional testing has further confirmed that the copy asset will not bring over original tag # to subsequent assets allowing users to specify the tag # for each subsequent asset at time of asset copy. This is desired result and is consistent with 7.02 business process.</p>

Action Item (AI) No.	Date Open	Description	Action/Response
AI5.	3/1/05	Transaction number for retirements (Reference Code)	<p>Since this is a State requirement, more research will be done to ensure that all State requirements will be met. Ashley Peters will perform more research.</p> <p><b>Follow Up Response:</b> PeopleSoft 8.8 will continue to display a Reference Code indicator which is a free form text field which the users can populate during Asset Retirements/Reinstatements.</p>
AI6.	3/1/05	Will all queries be converted to 8.8?	<p>It has yet to be determined if all of the current queries in version 7.02 will be moved forward into version 8.8. Ashley Peters and Derek Barber will discuss with state staff.</p> <p><b>Follow Up Response:</b> The existing population of queries in 7.02 (public and private) will be evaluated to determine which of those needs to be rebuilt and configured in PeopleSoft 8.8. This will be managed by distributing query development access to a selected group of users that will help with the design and development of required queries in PS 8.8 for ad-hoc reporting.</p>

### Parking Lot items

Parking Lot Item No.	Parking Lot Items
PL1	There were no Parking Lot items for this session